**IN THE UNITED STATES DISTRICT COURT
FOR THE EASTERN DISTRICT OF TEXAS
MARSHALL DIVISION**

MONUMENT PEAK
VENTURES, LLC
    Plaintiff,

v.

XEROX CORPORATION
    Defendant.

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CIV. A. NO. 2:21-cv-0345-JRG-RSP

JURY TRIAL DEMANDED

EXHIBIT 29

in   🔍   🏠 Home   👥⁴ My Network   💼 Jobs   💬² Messaging   🔔⁴¹ Notifications   👤 Me ▾

People | Criteria First 1   [Connections ▾] | [All filters]   Reset

5 results

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Carrollton, TX

Chris Majefski • 3rd+   [Message]
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Solutions Developer at Criteria First
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Overview

Managing content for knowledge sharing. Electronic content management and conversion of paper document to electronic knowledge.

Website
http://www.criteriafirst.com

Company size
2-10 employees

Home   My Network   Jobs   Messaging   Notifications   Me

Carrollton, TX

Locations (1)

Primary

3303 Greenglen Cir., Carrollton, TX 75007, US

Get directions ⧉

Exhibit 29
Page 4 of 28:

in 🔍

4
Home

My Network

Jobs

2
Messaging

41
Notifications

Me

n
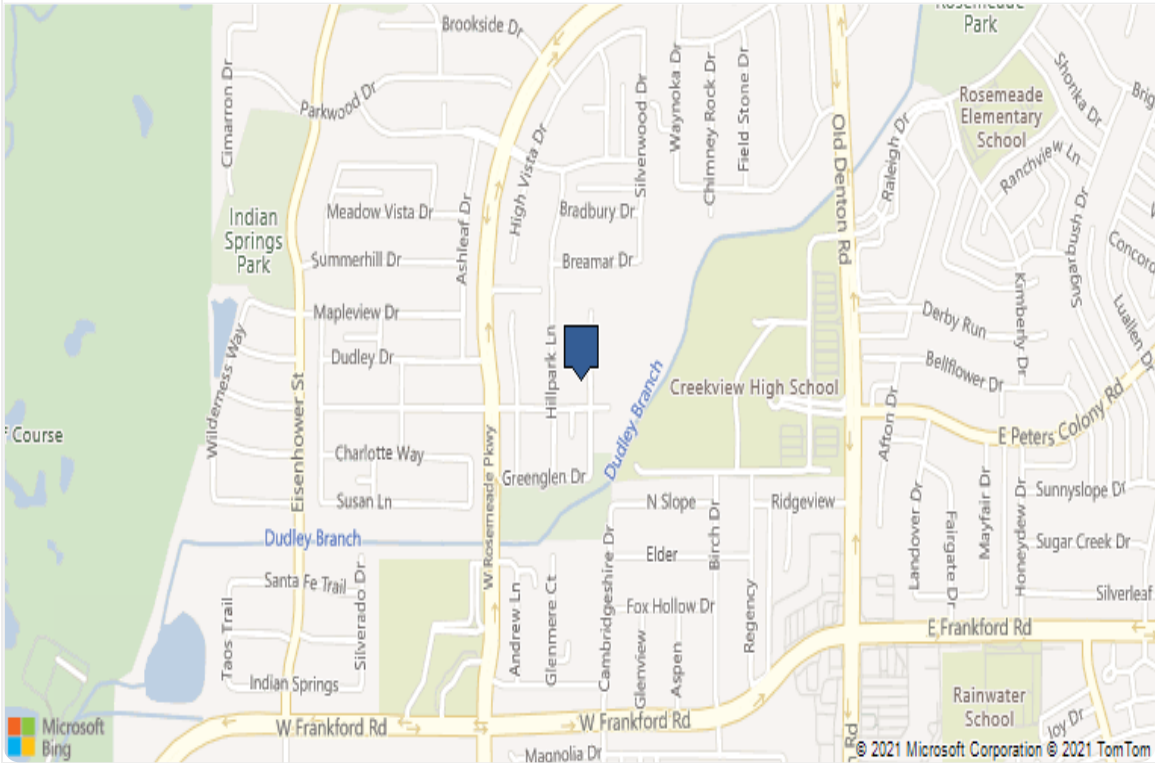
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:Page 5 of 28**

3/3

Criteria First

Converging knowledge from digital content and print

(/)

Methodology

Criteria First adheres to the concept of single-source reusable information. This entails using open, standard formats to encourage data exchanges among various systems that support cross-functional goals. We gravitate toward simple, inexpensive, effective tools to enable your staff to create, manage, and share content with each other and your customers and partners. Information should be served to foster collaboration among your workers and interoperation among your systems. We have chosen vendors with products that often layer or compliment one another. If your requirements don't match their specs, we'll find other products that will or refer you to other solution providers that can better serve you.

Knowledge & Work Practice Management

Recognizing the growing importance of human capital, Knowledge Management intensifies and improves the use of a company's most valuable asset. We prefer to describe it as Managing for Knowledge - developing an environment that fosters the continuous creation, collection, transfer, use, and re-use of knowledge in support of business value and performance. Our methodology involves:

▶ Establish knowledge initiatives by defining the vision, strategy, competencies and the knowledge culture.

▶ Assess existing knowledge resources, map process flows, and identify communities of practice.

▶ Design processes for efficient and effective knowledge protection, transfer, and re-use across organizational boundaries.

▶ Design and implement technology architectures for knowledge management that include portals, search facilities, and information mining capabilities.

Exhibit 29
:Page 6 of 28

Technology often isn't the whole answer, but just an enabler. You may also benefit from improving the manner in which your organization's members interact with one another. Clearly defined shared goals, incentives, and changes in the way they perceive one another may bring about greater trust, cooperation, and collaboration.

Dun & Bradstreet Past Performance Evaluation

This document provides insight to our commitment to providing excellent service by showing the ratings given to us by our customers. D&B designs and publishes such surveys so that companies can gain insight into their weaknesses and address them for future improvements. This is the first of our surveys and the results were so gratifying that we've decided to share them with you. Here are our survey results. (/articles/DandB_Past_Performance_Review_2011_14-524-2140.pdf)

Kudos - Compliments to Criteria First from Customers and Partners

We haven't been very good at repeating all the nice things our customers say about us, but that should change. We get a lot of good feedback via email and on the phone, so here are a few things we thought bear repeating.

Read our kudos (/index.php/21-spotlight/64-kudos).

Key Staff

Brief profiles so you can get to know us. (/index.php/key-staff/72)

Others we recommend for Business Services

Publication Printing (http://pubprinting.com/) - high quality printing with design and marketing expertise

Cool School Studios (http://www.coolschoolstudios.com/) - Supplies and essentials for students from K1-12 through college

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DocuShare®

Exhibit 29
:Page 7 of 28

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Back to Top

Exhibit 29
:Page 8 of 28

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Criteria First, Inc.
3303 Greenglen Cir.
Carrollton, TX 75007
972-492-4428 phone
866-843-1741 fax

(/CriteriaFirst.vcf)
vcard

Let us know how we can help.

Sales & Consulting (https://mail.google.com/mail/?view=cm&fs=1&tf=1&to=sales@criteriafirst.com&su=Tell me more about ...)

Support & Information (https://mail.google.com/mail/?view=cm&fs=1&tf=1&to=info@criteriafirst.com&su=Tell me more about ...)

Criteria First Credit Application (http://dev.avidoffice.com:99/lfserver/Criteria_First_Credit_Application)

Work with us if you're tired of dealing with others'
Customer Service Prevention Centers

Exhibit 29
:Page 9 of 28

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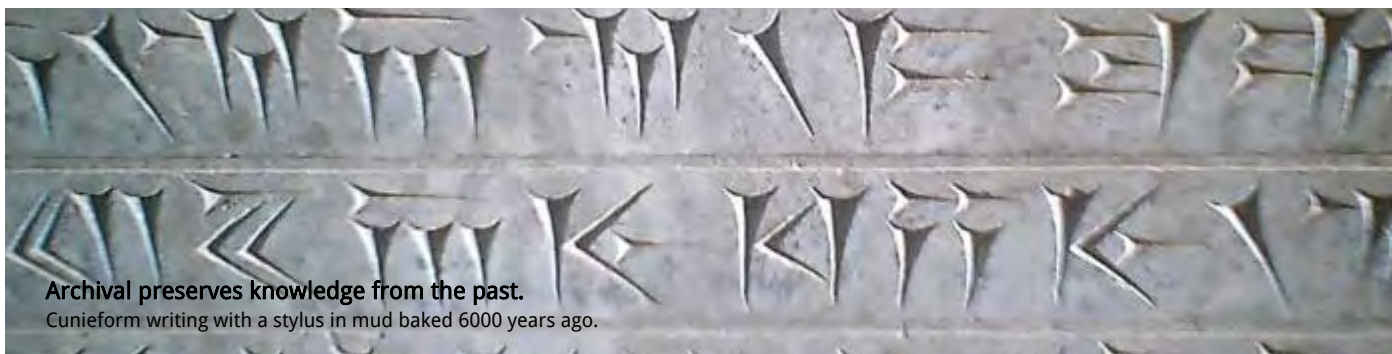
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Back to Top

**Exhibit 29
:Page 10 of 28**

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(/)

Archival preserves knowledge from the past.
Cunieform writing with a stylus in mud baked 6000 years ago.

Welcome to Criteria First

We were founded in 2002 to provide cost-effective expertise to knowledge management and archival tools and the workflow options you need to make it all work smoothly. If you are interested in great document management and data capture and conversion at reasonable prices, you've come to the right place. Be sure to link over to our online store with software and scanners to help you automate the kinds of jobs people hope to avoid doing themselves. It feels good to find bargains that makes everyone more fully enjoy their jobs and frees them to think and contribute more.

Criteria First online store for document and process managers

Exhibit 29
:Page 11 of 28

We're now able to serve you 24/7 with best-value products including capture and conversion software for corporate knowledge management and production document scanners with the best prices you're likely to see anywhere. Our scanner feature comparisons are the best you'll find anywhere.

(http://www.criteriafirstware.com/)

https://www.criteriafirstware.com (https://www.criteriafirstware.com/)

Xerox DocuShare 7.5 consultative sales, service, and excellent support!

Get more details on DocuShare 7.5 here or schedule an upgrade with us. (https://www.criteriafirstware.com/xerox-docushare-c7/)

Transform Accounts Payable Processes with Intelligent Automation

Thursday, Nov 18, 2021 10:00 AM - 10:30 AM CST

(https://www.criteriafirstware.com/WebinarRegistration-28.html)You didn't hire your accounts payable team just for data entry, chasing down invoices, and manually matching POs. Learn how Automate Intelligent Capture, our intelligent document processing solution, can take the pain out of data extraction, classification and routing to achieve smarter AP processes.

Whether your data is structured (from a spreadsheet, database, or portal), or unstructured (from emails, forms, and invoices), we'll show you how an intelligent AP automation solution can help you:

- Capture invoices the minute they arrive
- Automatically classify documents and separate your invoices from supporting documents
- Extract header, footer and line-item detail data and share with your AP or ERP solution
- Electronically route invoices for processing and approval
- See what invoices are queued for processing and apply strict controls to maintain compliance.

Join us to learn how you can transform your AP processes to save your team hours of manual work, cut back on errors, and save money by avoiding duplicate, late or overcharged invoices.

Exhibit 29
Page 12 of 28:

ABBYY FineReader PDF Deal of the Year

Set your reminders to order ABBYY FineReader PDF Standard for PC or Mac **between November 22nd and 30th**. The price will be reduced by 60%. It's accuracy and versatility for conversions is terrific. I've found it does a much better job of utilizing my scanner drivers than Kofax Power PDF Advanced or Nitro Pro. Our links to these sales will be found on our main site under On Sale for the duration of the sale.   This sale includes ...

- ABBYY FineReader PDF 15 Standard (full version)
- ABBYY FineReader PDF for Mac (full version)

Here is your **shortcut to savings** (/index.php/onsale), but they'll only show during the sale. The promo codes are included in the links.

(/index.php/onsale)

AvidOffice (http://www.avidoffice.com/docushare)

Interested in having DocuShare hosted for your organization? Rely on our expertise in setting up a new DocuShare server for you on an expertly managed cloud server and free your time for new challenges. Call for discussion, comparison, guidance, and pricing.

DocuShare Flex is available through Criteria First! (https://www.criteriafirstware.com/xerox-docushare-flex-c49/)

Cost is dependent on features, number of users, and size of your document repository.

Exhibit 29
:Page 13 of 28

Write to us at CriteriaFirst (https://mail.google.com/mail/?view=cm&fs=1&tf=1&to=info@criteriafirst.com&su=I'd like to know more about AvidOffice hosting) or just call us at 972-492-4428.

Criteria First teams up with HelpSystems to sell and implement Automate RPA

There are three levels of product offerings for small business, mid-size, and large enterprises to meet your needs. We have information on this on our **CriteriaFirstWare** (https://www.criteriafirstware.com/help-systems-automate-c47/) site to introduce you to the scalable implementations you can choose from. HelpSystems has specialized in this area for a long time and are highly regarded by independent professional reviewers as well as their customers. We'd like to help you implement RPA and save you time and money.

Here are some **independent user reviews** (https://www.g2.com/products/automate-robotic-process-automation/reviews) of **Automate RPA**.

Is RPA for us? (/index.php/14-services/110-does-your-organization-need-rpa)

Our ABBYY FlexiCapture for Invoices customization video on YouTube

This overview gives you a peek under the hood of ABBYY FlexiCapture for Invoices from both a project builder's and a user's point of view. Two custom features are included which show how you can catch duplicate invoices and invoices which have a total greater than the amount allowed by the purchase order. Also covered is our interface with **Xerox DocuShare** using our **DAVupDoc** middleware for fast and versatile automated filing. Watch for our video covering how to use DocuShare for approving or rejecting invoices that go over the amount in the purchase order or have no PO# associated with the invoice.

YouTube (https://www.youtube.com/watch?v=5xluo-wskqA&t=642s)

Criteria First Newsletters & Updates
for Xerox DocuShare & ABBYY recognition products admins and users

Exhibit 29
Page 14 of 28:

Missing Side-by-Side Viewer feature in DocuShare 7.5 (/index.php/18-newsletters/118-cf-newsletter-2021-11)

ABBYY FineReader PDF Deal of the Year (/index.php/18-newsletters/118-cf-newsletter-2021-11)

HelpSystems acquires PhishLab (/index.php/18-newsletters/118-cf-newsletter-2021-11)

Has KM been supplanted by RPA? (/index.php/18-newsletters/118-cf-newsletter-2021-11)

New Xerox production scanners (/index.php/18-newsletters/118-cf-newsletter-2021-11)

Sign up to receive our newsletters (http://dev.avidoffice.com:99/lfserver/Sign_up_for_the_Criteria_First_newsletter)

Do you really need a document management system? (/index.php/11-collaborate/15-dms-need)

(https://youtu.be/PIsju1cnQM4)

(/index.php/11-collaborate/15-dms-need)

For further information please contact us (https://mail.google.com/mail/?view=cm&fs=1&tf=1&to=info@criteriafirst.com&su=Please%20tell%20me%20more%20about%20...).

Write to set a time to talk and see a presentation tailored to your specific needs. (https://mail.google.com/mail/?view=cm&fs=1&tf=1&to=info@criteriafirst.com&su=I%20would%20like%20to%20discuss%20our%20document%20/%20content%20management%20needs%20%28include%20contact%20info%29)

You are here: Home (/index.php) ▸ Newsletters (/index.php/18-newsletters) ▸ CF Newsletter 2021-05

Key Articles

- CF Newsletter 2021-11 (/index.php/18-newsletters/118-cf-newsletter-2021-11)

- CF Newsletter 2021-10 (/index.php/18-newsletters/117-cf-newsletter-2021-10)
- CF Newsletter 2021-09 (/index.php/18-newsletters/116-cf-newsletter-2021-09)
- CF Newsletter 2021-08 (/index.php/18-newsletters/115-cf-newsletter-2021-08)
- CF Newsletter 2021-06 (/index.php/18-newsletters/114-cf-newsletter-2021-06)
- CF Newsletter 2021-05 (/index.php/18-newsletters/113-cf-newsletter-2021-05)
- CF Newsletter 2021-03 (/index.php/18-newsletters/111-cf-newsletter-2021-03)
- Does your organization need RPA? (/index.php/14-services/110-does-your-organization-need-rpa)
- CF Newsletter 2021-02 (/index.php/18-newsletters/109-cf-newsletter-2021-02)
- CF Newsletter 2021-01 (/index.php/18-newsletters/108-cf-newsletter-2021-01)
- CF Newsletter 2020-12 (/index.php/18-newsletters/107-cf-newsletter-2020-12)
- DocuShare 7.5 Workflow Reporting (/index.php/14-services/106-docushare-7-5-workflow-reporting)
- DocuShareInfo - check the health of your DocuShare (/index.php/14-services/89-docushareinfo-check-the-health-of-your-docushare)
- Two Powerful Capture and Indexing Options for DocuShare (/index.php/8-capture/82-two-powerful-capture-and-indexing-options-for-docushare)
- Automate your paper and digital workflows to improve productivity and information access (/index.php/18-newsletters/30-fc-ds-invoice-automation)
- Empowering Secure Managed Care Facilities (/index.php/8-capture/21-empowering-secure-managed-care-facilities)
- DocuShare OCR Crawler (/index.php/9-convert/16-docushare-ocr-crawler)
- Data Extraction for Oil & Gas Firms (/index.php/8-capture/13-data-extraction-for-oil-gas-firms)

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Exhibit 29
Page 16 of 28:

**Exhibit 29
:Page 17 of 28**

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(/)

Demonstrations & Webinars

We're looking forward to meeting with you to discuss problems you're facing in moving documents and data through your organization in the most efficient way possible. Once we have a clear idea of your requirements and desirements and determine we are in a position to help you, we can show you how we can meet your needs with our best of breed products and services. We have some generic demonstrations that show how certain capabilities can meet your needs that may suffice along with an examination of your documents, data, and processes. Sometimes we feel it's best to demonstrate a potential solution using your documents. All this requires open and honest discussions throughout the consulting and implementation process. We encourage you to engage with us by introducing yourself or looking at some of our videos, documentation, or just contacting us to talk.

Our ABBYY FlexiCapture for Invoices video on YouTube

This overview gives you a peek under the hood of ABBYY FlexiCapture for Invoices from both a project builder's and a user's point of view. Two custom features are included which show how you can catch duplicate invoices and invoices which have a total greater than the amount allowed by the purchase order. Also covered is our interface with **Xerox DocuShare** using our **DAVupDoc** middleware for fast and versatile automated filing. Watch for our video covering how to use DocuShare for approving or rejecting invoices that go over the amount in the purchase order or have no PO# associated with the invoice.

▶ YouTube (https://www.youtube.com/watch?v=5xluo-wskqA&t=642s)

Contact Us

Come and see ...

**Exhibit 29
:Page 18 of 28**

**Accounts Payable Automation with ABBYY FlexiCapture for Invoices
(http://dev.avidoffice.com:99/lfserver/FCI_Interest)**

Request for white paper with option to see a demonstration.

You are here: Home (/index.php)   ▶   Demos

Search

Search ...

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Back to Top

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FAQ&A

If you want to see another definition added, please drop us a note at info@criteriafirst.com (https://mail.google.com/mail/?view=cm&fs=1&tf=1&to=info@criteriafirst.com&su=Please add a definition for ...)

A **Document Management System** (DMS) allows users to store documents in a centralized repository for secure access by other users and groups who can contribute to the content and possibly revise it so that the information contained within the documents evolves. A DMS also accommodate many other file types aside from revisable documents and includes Acrobat PDF, image files, computer code, executable files, and other types. A DMS can also provide an environment for workflow software to drive processes involving updating documents and submitting them for additional processing. Many modern DMSs can also provide social networking and collaboration tools bound together by a common search engine with the documents that are indexed for quick search and retrieval. Some DMSs are referred to as content management systems because they provide these collaborative capabilities common to Content Management Systems and because they accommodate more than just documents.

A **Content Management System** (CMS) is typically used for building websites and allows additional modules for collaboration, e-commerce, and other functionality to make the content presentable to the user base. They provide built-in editors for adding content such as newsletters, the company's profile and purpose, product information, and services.

Data Capture is a set of methodologies to extract discrete data from other files or from scanned images of documents. Such extracted data can be fed into databases, spreadsheets, simple data files, and XML formats. The software may also use an API to interface directly with another system for optimum integration. The captured data can also be used to automatically file documents in Document Management Systems along with metadata to classify the documents make them more surgically searchable.

Document Conversion used to refer to the translation of documents from one revisable format to another more often than it does today. Document conversion today is usually associated with converting scanned documents into searchable PDFs or revisable documents and spreadsheets. This is done using workstation or server-based OCR products which can be used by an individual or shared among many in an organization.

Classification refers to identifying various kinds of documents and labeling them as such using metadata or filing methodologies. It is often used to direct

Exhibit 29
Page 20 of 28

document into a specific process for extraction of data or for automated filing. It can also be used for a dynamic display of a list of documents.

Robotic Process Automation (**RPA**) is a way to streamline your operations and save money doing routine operations. RPA is offered as developer studios that look like a programmer's development environment, but provides an interface that requires less skill to develop the agents that perform the defined sets of tasks to accomplish routine tasks. It takes less time to roll out an RPA solution than it would likely take for a good programmer to write, test, and deliver a unique set of programs to get the same results. RPA allows incorporating logical decision branching and many other workflow functions resulting in faster processing and inclusion of input from others that need to add their expertise to the process.

To determine if you need RPA, get up and walk around to see who's working while wearing a headset as an indication that they're doing mundane, routine work that doesn't require much thought or attention. The bright side is by replacing those operations with RPA it allows you to reassign your employees to focus on more customer-centric work that would contribute more to your company's profit line.

Scanner speed ratings are generally referred to as **PPM** and **IPM**. I'm not sure who came up with this, but it's misleading. PPM means Pages Per Minute which refers to one-sided or simplex scanning. IPM means Images Per Minute referring to two-sided or duplex scanning. The problem is a page is one side of a sheet of paper and equates to one image while IPM could mean the same thing. This should be referred to as simplex or duplex scanning, but the industry is stuck with these terms. IPM is typically 2X PPM for scanners that image both sides of a sheet at the same time. Copiers or Multi-Function Devices (MFDs) generally scan one side and roll the paper over to scan the other side and are significantly slower than dedicated scanners.

Metadata is information about something (or someone) for the purpose of classifying, describing, defining, or making the object more accessible. Invoices are typically stored in properties or fields with additional information to make them easier to find and retrieve whether by a person or a program. The metadata for an invoice may include the company name, the vendor ID, the purchase order number, the amount, the date payment is due, the terms of payment, etc.. It's not necessary to associate all metadata everywhere. This sometimes exists partially in one system, such as an accounting or ERP (Enterprise Resource Planning) system and in a document management system.

You are here: Home (/index.php)   ▶   FAQ&A

Search

Search ...

Search

Back to Top

Exhibit 29
:Page 21 of 28

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(/)

Kudos

"I've worked with several outside vendors, and y'all are the best."
Joseph Slayden, Project Specialist with ABSG ICS

Responsive

Following is a brief overview of our services. Call so we can elaborate and discuss your needs.

Collaborative Communities of Practice
Get your knowledge workers to stop reinventing the wheel. Build overlapping communities of practice in which individuals can benefit from the work of others within the organization. Collaborate with your partners and preferred customers. Unite them with notification of new content in areas of individual interest. Collaborate more effectively on projects.

Data Capture
We can help you capture data from various mediums and resources such as paper and PDFs you download or receive as email attachments. We can find the information in the document, capture it, let you verify or correct it, and export it to CSV, XML, spreadsheets, databases, or any other unique format you require including QuickBooks and other accounting systems. We export clean, valid data so you don't need another step to cleanse it.

Exhibit 29
Page 22 of 28:

Document Conversion

Bring us your tired old pages and we'll convert them into reviseable Word documents, Excel spreadsheets, or searchable PDFs to archive for instant recall with metadata for surgical search results.

Document Management

We can set up a comprehensive document management system that allows you to start small and scale to accommodate and empower your enterprise with the knowledge they need. We can also help you scan and index your hardcopy documentation for electronic archival and retrieval. We automate the filing process to reduce manual steps and speed up the process.

Process Improvement

We will examine your current business processes and recommend improved processes based on workflow capabilities built into our various products, tools, and services. Reducing time-consuming, tedious processes allow your employees to focus on activities crucial to delivering better products and services that contribute to your bottom line.

Form and Templates

Let us create the forms you need in a manner that can be utilized with efficient data capture tools to speed your ability to bring data to your spreadsheets and databases.

Xerox DocuShare Customization

We have extensive capabilities to bring a new look and new functions to your existing Xerox DocuShare site. Contact us with your needs and ideas.

Others we recommend ...

Publication Printing (http://www.pubprinting.com)

Quality print, quickly sent with less money spent.

This is a talented, high-quality print shop that actually backs up to the post office for fast delivery - just a short trip down the ramp. You'll appreciate their expertise and customer service. Don't order flimsy business cards from others, get quality cards you're proud to hand to customers and partners. Visit their site for a complete list of products and services.

You are here: Home (/index.php) ▸ Services

Exhibit 29
:Page 23 of 28

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Search

| Search ... |

Search

Back to Top

Exhibit 29
:Page 24 of 28

Criteria First

Converging knowledge from digital content and print

(/)

Archival preserves knowledge from the past.
Cunieform writing with a stylus in mud baked 6000 years ago.

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XEROX DocuShare® Business Partner

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Best-value products for your organization

If you've ever researched products extensively, you'll also know the old maxim, "you get what you pay for" isn't generally true. There are good values everywhere if you take the time to look, compare, and evaluate. The products selected featured on this page have helped many organizations build collaborative communities of practice that connect people to their content and to one another. These best value solutions have been selected to streamline processes and reduce your cost of operations.

Xerox DocuShare 7.5 (https://www.criteriafirstware.com/Xerox-DocuShare-c7/)

Exhibit 29
:Page 25 of 28

The most cost-effective and scalable solution available letting you start with document archival and workgroup collaboration and growing with you from department to enterprise with one server or several federated servers. The CPX edition adds process automation and other capabilities beyond the advanced document management capabilities of the Core edition. Runs on Windows, Linux, and Solaris Unix.

DocuShare Editions Comparison Chart (/library/DocuShare_Editions_Comparison_Chart.pdf)

HelpSystems Automate Desktop, Plus, and Ultimate Editions (https://www.criteriafirstware.com/help-systems-automate-c47/)

Robotic Process Automation (RPA) allows you to look at those mundane, routine, migraine-inducing responsibilities and question whether there is a way for software to take over and perform those operations for you. This frees those doing such functions the ability to work in more beneficial and satisfying ways and increase their value to your organization. We have three products that can scale incrementally from one to the next as you find more routines for RPA to perform for you helping your business to grow.

ABBYY FlexiCapture / FlexiLayout (http://www.criteriafirstware.com/ABBYY-Recognition-Products/ABBYY-FlexiCapture-10-Distributed-Fixed-Form-Only-edition-with-Admin-Station-design-tools-120K-PPY-with-1-year-MUA-p36.html)

Capture information from forms and documents to feed into your databases and/or to use in automatically filing your documents where they belong by using DAVupDoc. FlexiCapture is used for invoices and orders and many various types of documents. The FlexiLayout Studio allows you (or us) to create dynamic templates that seek out the information in your documents you want to extract. You then just verify the captured words and numbers that FlexiCaptures determines to be uncertain and presents them to you for correction, if necessary. FlexiCapture reads various kinds of print including dot matrix and handprint along with barcodes, bubbles, and checkboxes.

ABBYY FlexiCapture for Invoices (http://www.criteriafirstware.com/ABBYY-Recognition-Products/FlexiCapture-for-Invoices-p415.html)

ABBYY FlexiCapture for Invoices is a ready-to-run accounts payable automation solution that enables companies and organizations across the globe to dramatically increase the productivity of their AP processes. With its automatic classification and learning where your data is located on poorly formatted invoices, it supports straight-through processing for PO-based invoices and automatically identifies invoices requiring approval, enabling many processes in the AP chain to be streamlined. We can assist with an approval workflow in DocuShare for you.

Watch for our video covering how to use DocuShare for approving or rejecting invoices that go over the amount in the purchase order or have no PO# associated with the invoice.

▶ YouTube (https://www.youtube.com/watch?v=5xluo-wskqA&t=642s)

ABBYY FineReader Server (http://www.criteriafirstware.com/ABBYY-Recognition-Products/ABBYY-FineReader-Server-14-p446.html)

Exhibit 29
Page 26 of 28:

This could be the perfect tool to convert all your contracts, correspondence, and other documentation into an easily searchable format that everyone in your company can use. People and programs can both use the input/output folder set for routinely converting documents or you can email your scans and other images to it and receive your converted document as an attachment. Other interfaces and connectors exist for websites, FTP servers, SharePoint, and DocuShare (see DAVupDoc from Criteria First) and a full API for precise control using job tickets. You can convert from scans and image-only PDFs to editable Word and Excel documents and from MS Office formats to searchable PDFs in fast, scalable batch mode. Some of our customers use the Indexing Station to tag documents to automate the filing process into DocuShare and other systems. This is a versatile OCR platform that enterprises really suffer without.

DAVupDoc (http://www.criteriafirstware.com/Criteria-First-Products/DAVupDoc-p9.html) © by Criteria First

This the universal document upload program we've created to take information from your data capture and print-to-file software to DocuShare. Information extracted from your forms, documents, and reports can be used to quickly and easily create a template to determine where your documents are to be archived and associate all the relevant information as metadata so that it can be used to categorize and retrieve them when you need them. DAVupDoc works with any document format. A command line interface allows you to process your files in batch mode all day long. A free 15 day trial is available.

DocuPage Pro (http://www.criteriafirstware.com/Criteria-First-Products/DocuPage-Pro-p11.html)© by Criteria First

View your scanned image files and PDFs and enter relevant information about them and select from drop-down lists. Once your documents are "tagged" you can click on the Proof button to make sure you haven't missed anything, then Send them to DocuShare. Your template indicates how the documents will be named and where they will be filed. Your information about the document becomes metadata. Expiration dates can be set for later archival. For more information, click on the product name.

For a complete listing of our product line, see our online store at **http://www.criteriafirstware.com (http://www.criteriafirstware.com)**

Be sure to view our Services (/index.php/services) page to see how these products can be implemented to increase your productivity.

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Exhibit 29
:Page 27 of 28

Exhibit 29
:Page 28 of 28